

DD / S A D I S T R Y
FILE Personnel 17

19 September 1968

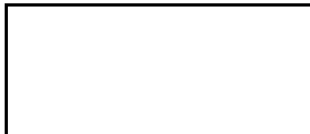
Acting Director of Training

819

1000 Glebe

Rod:

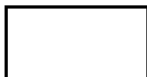
Attached is the memorandum dated 7 August 1968 from [] to the Director of Personnel requesting re-instatement of his originally established retirement date of 30 September 1971. Per our telephone conversation if you concur in this action, Mr. Bannerman has indicated his concurrence for the reason stated in his note which has been added to the memorandum.



EO-DD/S

7D24

Hqs.



EO-DD/S:VRT:dlk (19 Sept 68)

Distribution:

- Orig - Adse w/O of DD/S 68-4270
- 1 - DD/S Subject w/cy of 68-4270
- 1 - DD/S Chrono

DD/S 68-4270: Memo dtd 7 Aug 68
subj: Retirement Planning - []

STAT

DD/s 68-4/276

7 August 1968

MEMORANDUM FOR: Director of Personnel

SUBJECT : Retirement Planning--
[redacted]

REFERENCE : Memo from D/Pers to
[redacted]
24 Jun 68, same subject

1. I respectfully request your approval for an extension of Agency employment from 30 June 1970 to 30 September 1971, a total of 15 months.

2. The extension, if approved, will permit the attainment of 30 years of federal service and prevent any reduction in my annuity. Retirement on the earlier date of 30 June 1970, as proposed in a memorandum from the Director of Personnel dated 27 April 1967, would result in an approximate 10% reduction in the annuity, including that paid to my survivor.

3. Over the years I have planned and looked forward to full retirement after 30 years of service and have therefore assumed obligations accordingly. Extension of employment to September 1971 will enable me to liquidate the major portion of outstanding financial obligations that otherwise would be discharged from a substantially lower income base.

4. I will be pleased to provide any additional information you may require in reaching a decision on my request.

[redacted]

STAT

CONCUR:

/S/
John Richardson
Director of Training

28 SEP 1968

Date

CONCUR:

SIGNED R. L. Bannerman
R. L. Bannerman
Deputy Director
for Support

24 SEP 1968

Date

APPROVED:

?
Robert S. Wattles
Director of Personnel

Date

Distribution:

Orig & 1 - Adse

X - DD/S Subject

1 - DD/S Chrono

2 - DDTR (lw/h)

STAT

* [] was among a small group of employees whose original retirement date was established at age 60 with 30 years of service. Subsequently the Civil Service Retirement Policy was changed to permit retirement without reductions in annuity at age 60 with 20 years of service. [] was advised that this policy change advanced his retirement date accordingly. Following the extensive review of the Agency's retirement policy, the Director approved on 3 May 1968 a new statement of policy which in part said that those employees who originally had retirement dates fixed at age 62 with five years or more of service, or at age 60 with 30 years of service and whose retirement dates had subsequently been accelerated based on the revised Civil Service policy, could request restoration of the original retirement date. In [] case this latest policy statement was communicated to him by a memorandum dated 24 June 1968 from the Director of Personnel. By the reference in [] memorandum dated 7 August 1968, it is apparent that his appeal is based upon the memorandum which he received from the Director of Personnel. On this assumption I concur in his request for extension of Agency employment from 30 June 1970 to 30 September 1971.

TRANSMITTAL SLIP

DATE
19 September 1968TO:
Acting Director of TrainingROOM NO.
819BUILDING
1000 Glebe

REMARKS:

Rod:

Attached is the memorandum dated 7 August 1968 from [] to the Director of Personnel requesting re-instatement of his originally established retirement date of 30 September 1971. Per our telephone conversation if you concur in this action, Mr. Bannerman has indicated his concurrence for the reason stated in his note which has been added to the memorandum.

FROM:
EO-DD/SROOM NO.
7D24BUILDING
Hqs.

EXTENSION

FORM NO. 241
1 FEB 55REPLACES FORM 36-8
WHICH MAY BE USED.

(47)

TRANSMITTAL SLIP

16 SEPT 68

TO:
Mr. Bannerman

ROOM NO.

BUILDING

REMARKS:

Direct to you —
You may wish to show
to Vernon & Jack —

RBL

FROM:

ROOM NO.

BUILDING

EXTENSION

FORM NO. 241
1 FEB 55REPLACES FORM 36-8
WHICH MAY BE USED.

(47)

TRANSMITTAL SLIP

DATE

24 September 1968

TO:
Mr. Bannerman

ROOM NO.

BUILDING

REMARKS:

Mr. Richardson has now concurred in the [] retirement request and I have added a note explaining the situation.

Recommend your signature.

VT
VRT

FROM:

ROOM NO.

BUILDING

EXTENSION

FORM NO. 241
1 FEB 55REPLACES FORM 36-8
WHICH MAY BE USED.

(47)

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FOR YOUR INFORMATION

4 Sept 68

MR. BANNERMAN **B-4 SEP 1968**

MR. COFFEY 

ROUTING AND RECORD SHEET

EYES ONLY

SUBJECT: (Optional)

FROM: Director of Training
1000 Glebe 819
EXTENSION
NO. DTR-1746
DATE 3 September 1968

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. Deputy Director
for Support 7D 24

4. Left. RB

EYES ONLY

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INFORMATION

[REDACTED]

AUG 11 1983

MR. COFFEY--

REGISTRY--Pls hold

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OFFICIAL ROUTING SLIP

TO	NAME AND ADDRESS	DATE	INITIALS
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<input type="checkbox"/> CONCURRENCE	<input type="checkbox"/> INFORMATION	<input type="checkbox"/> SIGNATURE

Remarks:

Bob:

I suggest that the substance of this memorandum and especially the attached paper on "Retirement Rationale" be given fairly wide dissemination within your Directorate.

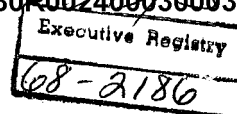

LKW

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FOLD HERE TO RETURN TO SENDER	
FROM: NAME, ADDRESS AND PHONE NO.	DATE
Executive Director 7D59 HQ	6 MAY 1968

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30 April 1968

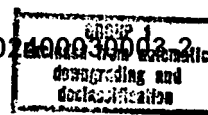
MEMORANDUM FOR: Director of Central Intelligence

SUBJECT : Retirement Policy

1. This memorandum submits recommendations for your approval in paragraph 4.
2. During the past several weeks I have reviewed the Agency's retirement policy with the Deputy Directors, the General Counsel, the Inspector General, the Director of Personnel, and the Chairman of the CIA Retirement Board.
3. Our discussion and conclusions are summarized as follows:
 - a. The National Security Act of 1947, Section 102 (c), provides, "Notwithstanding the provisions of section 6 of the Act of August 24, 1912 (37 Stat. 555), or the provisions of any other law, the Director of Central Intelligence may, in his discretion, terminate the employment of any officer or employee of the Agency whenever he shall deem such termination necessary or advisable in the interests of the United States, but such termination shall not affect the right of such officer or employee to seek or accept employment in any other department or agency of the Government if declared eligible for such employment by the United States Civil Service Commission."
 - b. The principal issue of our discussion, and from which all others flow, is whether the Agency should have a policy requiring retirement earlier than provided by law under the Civil Service Retirement Act or the CIA Retirement and Disability System for GS-18s and above. After considerable discussion, it was the consensus that there should be an early retirement policy with a stipulated age at which most employees

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should leave. At the same time, it was recognized that, because the Directorates have different problems, Agency policy should be flexible enough to permit liberal exceptions when justified. This appears to be particularly true in the Intelligence Directorate because of the various types of professional employees needed and because these professionals often are individuals who have prepared themselves through academic study for long-range professional careers where an arbitrary retirement age would not be a condition of employment. Rationale in support of such a policy is attached at Tab A.

c. Having reached agreement that the Agency should have an early retirement policy with provision for exceptions to meet particular needs or circumstances, we then discussed the types of exceptions that could be identified and action recommended in advance. General agreement was reached on the following:

(1) There should be no general exception for employees who argue that at the time they entered on duty they were led to believe (or now believe) that they had the right to work until age 65 or 70, depending on the retirement system in which they participate.

(2) There is a small group (12) of Agency employees who will not have 12 years of creditable service by their scheduled retirement date. We feel that these employees, as a group, should be permitted to remain on duty until they accumulate 12 years of service when they earn the right to continue important statutory hospitalization and life insurance coverage.

(3) As originally conceived in 1959, our early retirement policy expected employees to retire at age 60 with 30 years of service or at age 62 with at least 5 years of service. When the Civil Service Retirement Act was amended in 1966 to include a provision for optional retirement at age 60 with 20 years of service, Agency policy was in turn revised. There were some employees who prior to the revision of Agency policy had been informed

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that their scheduled retirement would be at age 62 and presumably planned accordingly. With the change, their scheduled retirement age was lowered to 60. We feel that these employees should be permitted to remain on duty until age 62 if they so request. This does not include those employees who at age 60 have at least 30 years of service since this was a requirement under the earlier Agency policy.

(4) An overall exception should be made for the group of printers (57) who were induced to transfer from the Government Printing Office to the Agency with the assurance that they would not lose any benefits.

(5) There should be no overall exception for lower graded clerical employees. Each such case should be considered on its own merits.

(6) There should be no overall exception for employees with technical skills in grades GS-7 and below even though it might be difficult to recruit replacements and their loss would create training problems. Each such case should be considered on its own merits.

(7) No overall exception should be made for employees merely because they are writing Agency history.

4. It is recommended that:

a. Agency policy continue to provide that employees generally will be required to retire at age 60 or as soon thereafter as they are eligible for optional retirement under the law, regardless of whether they are covered by the Civil Service or the CIA retirement system.

b. Exceptions to the general policy be considered by the Director on an individual case basis when requested by the Head of Career Service or a Deputy Director.

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SUBJECT: Retirement Policy

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- 0 & 1 - D/Personnel
- 1 - ExDir-Comp
- 1 - ER
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- 1 - DD/P
- 1 - DD/I
- 1 - DD/S&T
- 1 - General Counsel
- 1 - Inspector General
- 1 - C/BSD/OP

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RETIREMENT RATIONALE

1. The production of intelligence bearing on the national security for use at the highest levels of policy determination of the United States Government is a responsibility of the gravest note. The organization bearing this responsibility should be staffed with persons of the highest available intellect, integrity, professionalism, dedication, perspicacity, and dynamism. The Central Intelligence Agency's retirement policy is an essential element of its program for ensuring that its staff possesses these attributes to the highest degree feasible.

2. The personnel staffing program of the Agency is based on the concept of selective recruitment for career employment and managed career development. Selection standards are designed to accept only persons with the highest qualifications and potential for development. The Agency's development program provides a career-long blend of formal training and managed progression through appropriate assignments of increasing breadth and responsibility.

3. The goal of the Agency's development program is to place the best available employee in every position. Promotion policy reinforces career development by advancing those who excel and have the capacity for further growth. The Agency's rigorous system for evaluating the performance of its employees is designed to assure high levels of effectiveness. Those who are unsatisfactory are separated; those who are marginal or unlikely to find full career satisfaction are counseled to resign.

4. Intelligence activities are characterized by continuous changes--in requirements, methods, techniques, processes, and emphases. As these changes occur, the Agency reassigns its career staff employees and provides supplementary training as required. To the extent that these measures do not meet the needs, requisite skills, experience, and special abilities are acquired by the employment of new personnel.

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5. Because there are practical limits to the size of the Agency, the requirement for new employees and the operation of the career development program cannot be accomplished without attrition. Part of this attrition is provided by involuntary separations and resignations through the Agency's system for evaluating employee performance. Other vacancies are provided by voluntary retirement and resignation and by death and disability. But together these do not create a sufficient number of vacancies.

6. The Agency's retirement policy is an integral part of its program to maintain the high level of performance required by its mission and responsibilities. It also provides the additional attrition necessary for career development and the acquisition of new employees. This policy, adopted in 1959, generally limits the career span of its employees to age 60.

7. Agency employees, with some exceptions, have all attained their career peaks several years before reaching age 60. They have had a full CIA career and have made their maximum individual contribution to their Government. Exceptions specifically contemplated are individuals who possess rare scholarship and talents that would be difficult to replace in the normal course of career development and whose retirement would not be in the best interests of the Government. In some cases retirement at 60 may result in loss of valuable experience and know-how and only generate a recruitment and training requirement.

8. It is recognized that enforcement of the policy to retire employees at age 60 occasionally subordinates the personal desires of the individual to the best interests of the Government. This is usually the case when it is necessary for any reason to separate an employee. The normal voluntary retirement age for most Federal employees is 65, and the compulsory age under the Civil Service system is 70. Similar retirement ages for CIA would result in the gradual accumulation of an excessive number of employees of declining performance, whether due to declining health, motivation, or drive or to inability to adapt to change. The effectiveness with which the Agency fulfills its extraordinary responsibilities depends entirely upon the highest possible level of effectiveness in staffing the Agency. Consequently, extraordinary action toward attaining

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and maintaining this goal--such as effecting a retirement policy more stringent than that for the Federal service in general--is warranted.

9. Retirement at age 60 may appear less appropriate for those Agency employees who are in positions that are not unique to intelligence activities. In theory, it might be possible to identify all such positions and exempt the incumbents thereof from the retirement policy.

10. There are two reasons for not doing so. Attempts to formulate criteria of differentiation would generate new problems of morale and administration. The creation of exempt categories of employees would foster odious comparisons. It would thwart the implementation of the general retirement policy indefinitely as groups and individuals pleaded their individual cases.

11. The more fundamental reason for not exempting certain categories of Agency employees is that the work of the Agency must be performed with utmost responsiveness. This requires a general state of mind on the part of all employees that timeliness is critical, accuracy is imperative, and absorption with the task at hand takes priority over personal distractions. Advancing years inevitably bring about a lessening of work vigor and enthusiasm. The larger the proportion of older employees, the greater the debilitating effects on the tenor of the Agency.

12. In summary, the age 60 retirement policy is a key element of the Agency's efforts to attain excellence in its staffing. Without the policy the entire personnel program of the Agency would be impaired. The most vigorous and productive individuals, finding themselves stymied, will leave the service or will never be persuaded to enter in the first place. By shortening the career span of all employees, service in intelligence will continue to be highly attractive to outstanding young men and women. In the end, our national intelligence objectives will be best served.

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OFFICIAL ROUTING SLIP

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<input type="checkbox"/>	CONCURRENCE	<input type="checkbox"/>	INFORMATION	<input type="checkbox"/>	SIGNATURE

Remarks:

Per your request this is a copy of a
 memorandum sent to

FOLD HERE TO RETURN TO SENDER

FROM: NAME, ADDRESS AND PHONE NO.	DATE
DC/ROB <i>MB</i> 205 Magazine Building	18 Sept 68

C-O-N-F-I-D-E-N-T-I-A-L

MEMORANDUM FOR:

SUBJECT : Retirement Planning

1. After a thorough review, the Agency's current retirement policy for employees covered by the Civil Service Retirement Act has been reaffirmed. These employees will be required to retire at age 60 with 20 years of service or age 62 with at least 5 years of service.

2. Although the Director of Central Intelligence desires maximum conformance to this policy, requests for extension will be considered on an individual basis. In your particular case you were initially advised under the then existing policy that you would be expected to retire when you had completed 30 years of service. Subsequently, you received a second memorandum accelerating your retirement date under a revised policy which was adopted in line with the 1966 amendment of the Civil Service Retirement Act permitting retirement at age 60 with 20 years of service without reduction in annuity. If your plans for orderly retirement at the earlier date cannot be formalized, your request for an extension will be considered.

3. To assist in orderly manpower planning, we would like to know as soon as possible whether or not you intend to seek an extension. Your advice in this regard should be forwarded to my office through your supervisor and your Career Service. If you have not yet come to a decision on this matter, we will appreciate your letting us know your tentative plans. Your early response will be appreciated.



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Robert S. Wattles
Director of Personnel

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GROUP I
Excluded From
Automatic Down-
grading and
Declassification